

dp donorperfect

COMMUNITY CONFERENCE
SPARK





Hello, my name is Janet Carroll

Volunteering for the greater good has always been a priority and working directly with amazing people at non-profit organizations for over 20 years has been both an honor and a privilege. Thank you for all that you do, making a difference every single day, making the world a better place.

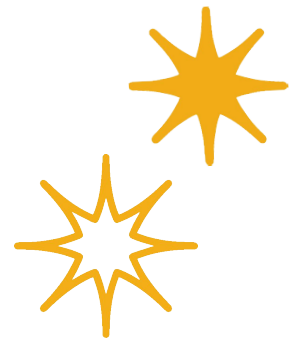
CONNECT WITH ME:

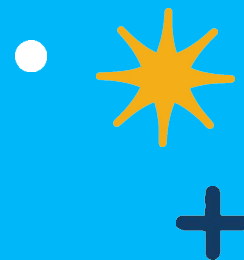


JCarroll@DonorPerfect.com

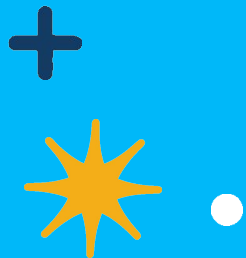


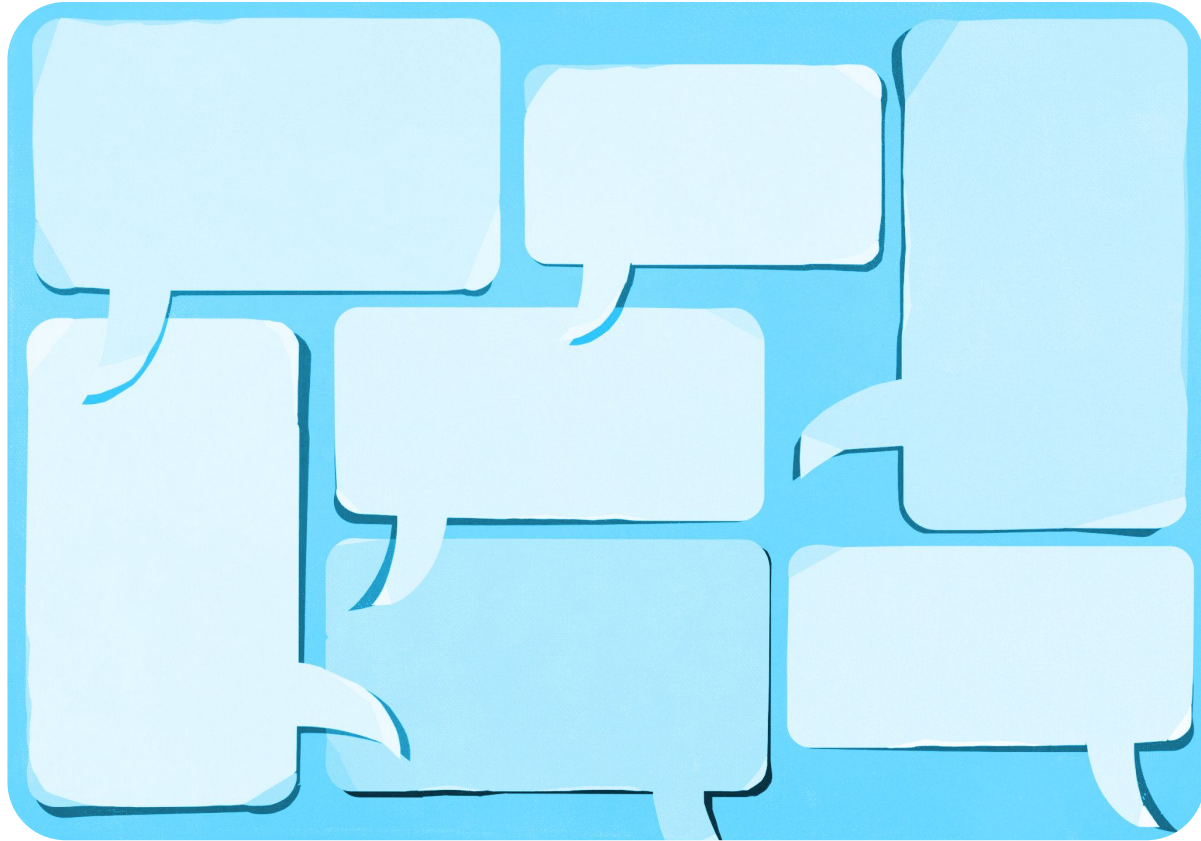
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Spark Stronger Relationships with Your Prospects and Donors







Today's Focus

- Touch points
- Documenting the details
- Reporting the details
- Communication Checklist





Touch Points

Cultivation

- What is your goal?
- What did you send?
- How you sent it?
- Was there any interest?

Stewardship

- What is your goal?
- Is this a personal check-in?
- What are your Interactions?
- Should you offer a survey?



Documenting the Details


Define the Tasks


- **Who** is responsible?
- **What** are the details?
- **How** will this communication take place?
- **When** does this need to be completed?




Setup - Codes



- Track important details
- Automate values, if possible



Contact/Entry Date 



Due Date 

Time

Completed Date 

Activity  

Mailing Code  

Assigned To  

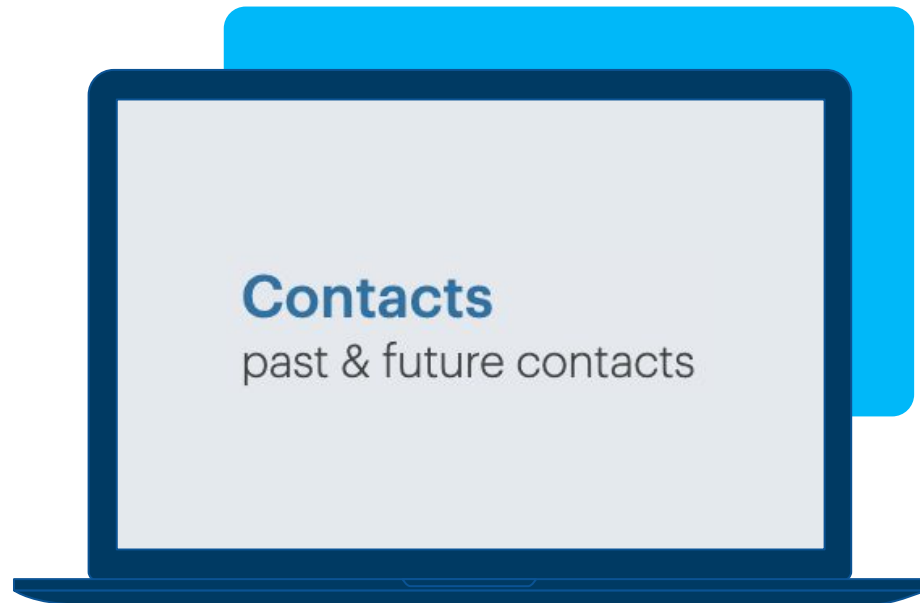
Contact Notes



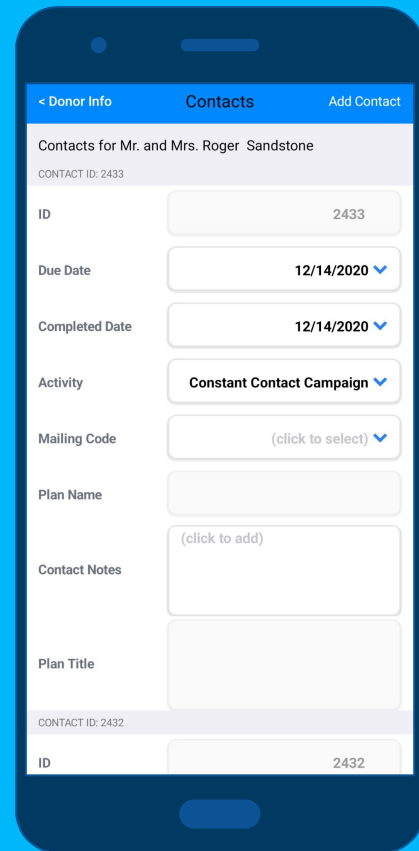
Contact Management Activity List

Due Date	Completed Date	Activity	Name	Phone	By Whom
7/5/2024		ME	Adams McKinley Corporation (252)	W:(215)622-8377	KELLY20
7/12/2024		TE	David & Florence Afelskie (485)		AMANDA
7/12/2024		TE	Steven Agarwal (308)		AMANDA
7/5/2024		ME	Allentown Hospital (380)	H:570-222-1212	KELLY20
7/12/2024		TE	Amazing Foundation (381)		AMANDA
8/1/2024		ME	The American Federation of Banking (320)		KELLY20
8/5/2024		ME	Michelle Berley (234)		KELLY20
6/7/2024		MIDINTROC	George Jetson (100)		JANET_D

It's Data Entry Time!

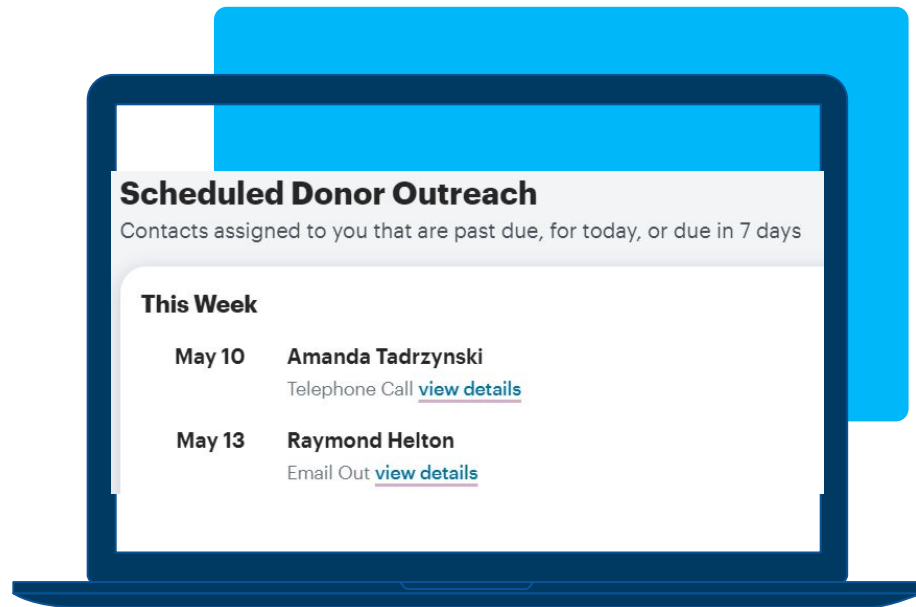


On the Road? Use DPMobile!



Setup - Reports

- Determine your needs
- Choose the best format





Reporting the details

Helpful Reports

- Contact Calendar
- Easy Reports
- Scheduled Donor Outreach (Home Page)
- Contact Listing Report
- Dashboard Reports

July, 2024 Calendar

for ALL user(s)

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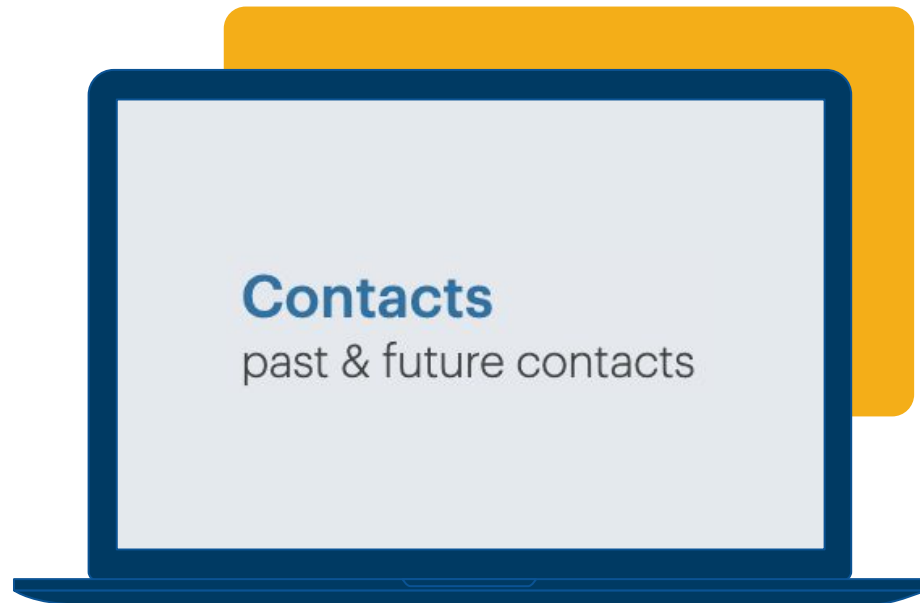
[Next Month >>](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2 Adams McKinley Corporation (KELLY2021) Meeting	3	4	5 Allentown Hospital (KELLY2021) Meeting	6
7	8	9	10 David & Florence Afelskie (AMANDA2021) Telephone Call	11	12 Steven Agarwal (AMANDA2021) Telephone Call Amazing Foundation (AMANDA2021) Telephone Call	13

Touch Points - by Person then Activity

Person Assigned	Activity Descr	Due Date	Donor ID	First Name	Last Name	Home Phone	Mobile Phone	Mailing Code
Amanda Tadrzynski Telephone Call								
		07/10/2024	485	David & Florence	Afelskie	(610) 599-7821	(610) 529-4250	Major Donor Engagement 2024
		08/11/2024	440	Sean	McClellan	(484) 659-8703	(267) 528-5497	Major Donor Engagement 2024
		08/12/2024	50	Channing	Tatum	(545) 514-9961	(545) 783-2594	Major Donor Engagement 2024
Count: 3								
Janet Carroll Mailing								
		05/05/2024	505	Amanda	Tadrzynski		(267) 563-0540	New Donor Welcome Packet
Count: 1								
Janet Carroll Major Donor Phone Call								
		08/12/2024	506		United Way of Pennsylvania			
Count: 1								

It's Reporting Time!



- Document with intention
- Use DonorPerfect tools
 - Default values
 - DPMobile
 - SmartActions
- Report
 - Be current
 - Assess your efforts
 - Dashboard reports
 - Schedule reports

SPARKING Communication Checklist



Keeping on top of touch points will undoubtedly spark internal and supporter engagement.





Thank you!

We stand beside all of you as you set yourselves up for success with organized task planning, note taking and regular reporting to keep you on track.

